CONTACT CENTERS INDUSTRY REPORT 2020

CX Network offers advice from leading industry professionals on how to optimize your contact center methodology for the next 12 months

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Foreword

Contents

Rather than being merely viewed as a resource to troubleshoot user issues, contact centers are becoming a key component of customer experience strategies. These units enable organizations to interact with customers on issues that matter to them and in turn build brand rapport by providing much needed service support. As the world adapts to Covid-19 social distancing mandates, the traditional physical infrastructure of contact centers has been greatly disrupted. This has forced brands to swiftly consider alternative methods for successfully handling customer interactions and delivering loyalty winning customer experiences with a remote workforce.

In this report, CX Network examines the key discussion points revolving around contact center methodology today, focusing on the recent pandemic, digital transformation, self-service, the new normal of customer contact and voice of customer. This report will feature a range of industry experts from the likes of Google, PagoFX, Marley Spoon and BGL Group, as well as a research group of contact center and customer service professionals.

The findings will provide visibility on what the contact center of the future will look like and offer advice on how to adjust contact center strategies to stay effective in times of crisis and remain relevant in a rapidly evolving industry.

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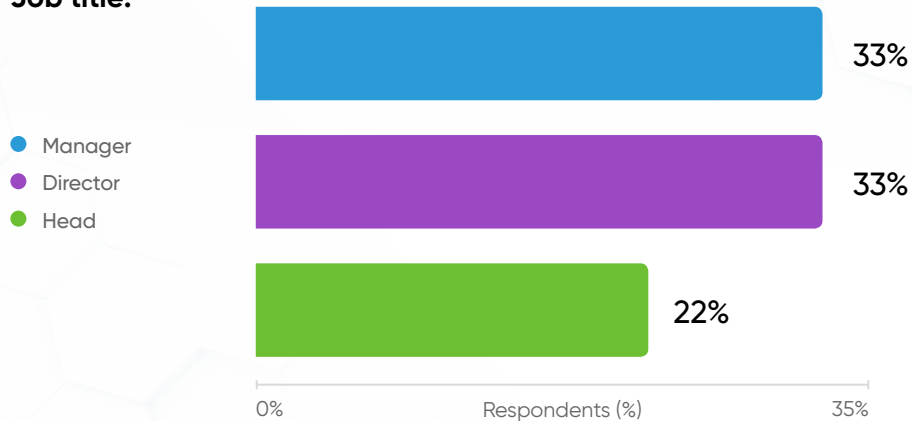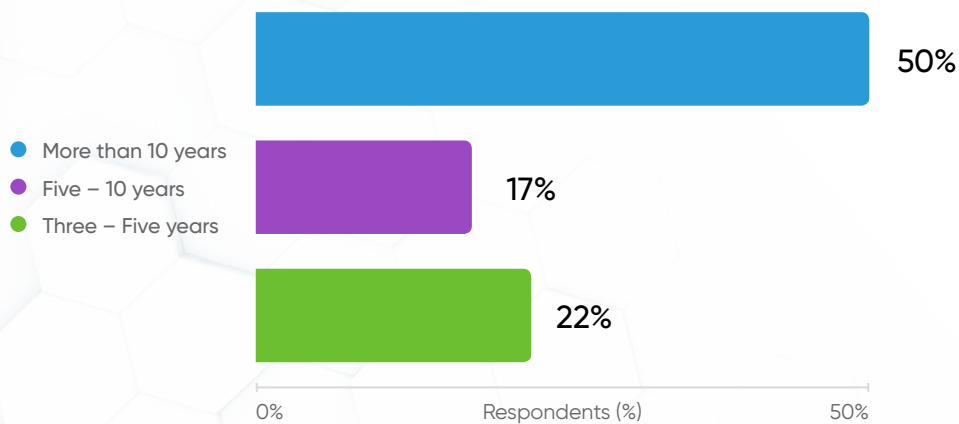
About the experts

Research group: To provide context for the survey results that will feature in the report, here is breakdown of our research group of **18** contact center and customer service experts.

Job title:

33%

33%

22%

- Manager
- Director
- Head

0%   Respondents (%)   35%

Years of customer service/contact center experience:

50%

17%

22%

- More than 10 years
- Five – 10 years
- Three – Five years

0%   Respondents (%)   50%

72% of the group have direct influence over customer experience investments made at their brands

Report commentary also provided by:

Thomas Reby, head of product support at Google

Google

Katalin Fritz, chief customer officer at Marley Spoon

MARLEY SPOON

Lisa Steele, customer services director at BGL Group

bgl group

Antonio Barranco, global manager of customer care at PagoFX, part of Banco Santander

pagofx By Santander

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The recent pandemic

The impact of Covid-19

Global crises have the power to significantly disrupt the way organizations work. The effects will differ across different markets but one study has uncovered that customer experience is often hit the hardest. The analysis of more than one million customer service calls during the height of the Covid-19 pandemic saw the number of calls scored 'difficult' double in volume, from a typical 10 per cent to more than 20 per cent.

This year has seen call centers overwhelmed with enquires as a result of the epidemic and, at times, bent into providing frustrating, indifferent experiences to panicked customers, with customers suffering eye watering hold times only to be cut off by the provider without explanation.

As nations across the world attempt to adapt to government mandated social distancing and work from home policies as a result of the Covid-19 pandemic, the global situation has forced a number of changes in the way organizations manage their contact center customer experience strategy, meaning that contact centers are now working remotely rather than from a centralized base. Digital channels have proved very important in response to the Covid-19 outbreak, allowing brands to continue delivering the services customers need.

"The need to enforce social distancing and shut down commercial activity all over the world prompted us to quickly enable the entire workforce to work from home" notes Thomas Reby, head of product support at Google and member of the CX Network advisory board. "For the time being, we switched the entire operation to chat and email operations, effectively diverting phone operations to these channels."

Driving performance during difficult times

Despite the uncertainty, some organizations have successfully adapted their business models in order to remain competitive and provide the experience customers need. Lisa Steele, customer services director at insurance and financial services provider BGL Group, believes that the key ingredient to this is constantly listening to your customers, recognizing their challenges and adjusting products and services to support them.

"We recognized going into this that customers may have increased challenges around their payments," explains Steele. "So we increased capacity in our lending support team by around 60 per cent to respond to the anticipated increase." To support emergency services workers, BGL Group has added RAC At Home Assistance and offered complementary hire cars to their policies free of charge.

In light of the epidemic, brands have been increasing their empathy levels. Katalin Fritz, chief customer officer at Martha Stewart's meal delivery service Marley Spoon, notes that empathy must be displayed externally to customers and also internally to employees.

Marley Spoon in recent months has conducted bi-weekly internal surveys to attentively listen to employees and act upon insights. Fritz adds: "We have proactively communicated with our customers through bi-weekly CEO letters which have transparently shared our challenges and tried to set expectations. We also increased the frequency of reviewing text/sentiment analytics to weekly and attentively listened to Covid-19 specific topics so we could offer customers the resolutions they need."

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[24]7.ai | Digital transformation: Words of wisdom for contact centers

Patrick Nguyen, CTO of [24]7.ai discusses how contact centers need to innovate going forward based on lessons learned from the 2020 pandemic.

Reflecting on how the Covid-19 crisis has impacted how contact centers operate, Patrick highlights that in one month alone, 42 per cent of [24]7.ai agents shifted from physical contact centers to microsites or working-from-home.

This rapid transition required a concerted effort across technology, security and human resource teams. Nguyen recalls: "New processes were required, like equipment provisioning, flexible scheduling, online recruitment and onboarding. New systems were rolled out for accessing virtual desktops, monitoring at-home employees, managing risk and compliance, facilitating team collaboration, supporting and training agents."

"Most importantly, creative new ways were devised to engage a large, distributed workforce and make the employees feel part of a connected organization."

How digital transformation will benefit contact centers today and tomorrow

Digital transformation is an important business focus because the results will not only help customers now in the short-term, but also in the future should another pandemic strike.

"To prepare for customer service continuity when the next pandemic hits, companies need to invest in automation and collaboration technologies now to make remote agents more effective, productive and engaged." The act of deflecting calls to digital channels boosts the continuity of customer service in times of crisis because digital conversations are easier to automate or be handled by at-home agents.

Nguyen notes that asynchronous business messaging is not only the most effective digital channel, but the most preferred by customers. "Consumers rate business messaging higher on customer satisfaction and NPS because they are able to interact in their own time and at their own pace.

"Looking at workforce effectiveness, in comparison to phone calls, digital agents can handle a higher volume of concurrent conversations with business messaging, resulting in higher productivity. Also, teams of agents and experts can work together in the background to resolve issues correctly the first time a user reaches out rather than having to ask the customer to call back at a later point."

In summary, business messaging improves the customer experience while increasing a company's ability to field spikes in contact volumes.

Nguyen rightly reminds that companies should also look to reduce the load on human agents by automating a higher percentage of calls and chats. Conversational self-service channels such as speech bots (IVR systems) and chat bots must update swiftly so they can field any new customer requests triggered by crises.

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Channel integration hurdles to conquer

Many contact centers struggle to unlock the full benefits of digital transformation because they fail to connect experiences along the customer journey. These disconnects often occur between the following two areas:

Phone calls and digital channels

Voice and digital channels have traditionally lived in silos, run by different organizational owners and served by separate products and technologies. Nguyen notes: "Solving the organizational side of this issue requires a single overall owner with the vision and skills to manage customer experiences across all channels. Solving the technical element requires a single platform or an integration of multiple platforms that can share customer context as well as adapt experiences across voice and digital channels."

Self-service and human-assisted service

According to Nguyen the fracture points between self-service and agent systems occur because tech solutions often focus on one at the expense of the other. "Bot efforts usually focus on AI and automation and leave the transition to human agents as an afterthought. The worst offenders are bots that direct the customer to call an 800-number to speak to an agent. Agent systems will accept a simple handoff from a bot, but cannot pass control back-and-forth to optimize issue resolution."

He adds that brands should look to a holistic platform for customer interactions. "A higher-value solution is an integrated system where the bot and human agent can jump in and out at any point in the conversation based on when their skills are best utilized", says Nguyen.

Achieving the right blend of automation and human interaction

For customer experiences to be successful and financially viable, brands must find the right balance between automation and human assistance. Nguyen warns: "AI and human agents should not be viewed as competing alternatives. Instead, companies should implement a collaborative model that blends the two to take advantage of what each does best."

"AI can predict intent and offer consistently accurate answers and actions at large scale. These systems can relieve human agents of mundane tasks, and can provide advice based on the collective knowledge of the entire agent population."

"Human agents bring the personal touch: intuition, empathy and experience that AI-based systems can only emulate."

It's important that both modes augment each other to maximize business benefits for contact centers. Human agents can intervene to assist with automated enquiries if a customer raises a topic or category the AI has not yet been trained to recognize.

A healthy, strategic balance between agents and AI will help contact centers upgrade the experiences they deliver to customers. Brands should remember that the foundations they lay today for digital transformation will empower them to deliver high quality, loyalty winning experiences to customers in the long term, even in times of crisis.

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The rise of digital transformation and self-service

Covid 19 has taught brands and contact centers that digital transformation and smooth digital customer experiences are non-negotiable. Recent research from CX Network uncovered that more than half of CX practitioners surveyed identified digital customer experience as the leading trend in the field with self-service being one of the more prevalent manifestations of this trend.

Our research group of contact center experts was in consensus of this view. Highlighting the importance of digital transformation, the contact center research group rated digital customer experience as the top strategic investment priority for 2020 alongside contact center solutions.

"Digitization is an indisputable reality and any part of a company that is not guided by it is bound to be left behind," believes Antonio Barranco, global manager of customer care at financial services provider PagoFX. "Digitization can help customers contact a company from any device, at any time and allow the agent to access their information in real time."

BGL Group's Steele supports this assertion and states that the company's focus is to provide customers with the best digital experiences, now and for the future. She explains that BGL Group offers a complete range of 24-hour online services that can direct customers to self-service options or to contact center teams, helping customers feel supported throughout every interaction. This is critical as each experience a customer has with a brand impacts their perception of the organization, making it essential that brands do what it takes to ensure that this impact is positive.

Top 10 CX investment priorities according to our research group of contact center experts:

28% Contact center solutions

28% Digital customer experience

22% Customer journey mapping

22% Data and analytics

17% CRM

respondents could select multiple answers

17% Customer acquisition

11% Cloud Services

11% Customer complaints management

11% Customer insight

11% Customer loyalty and retention

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Disrupt the way your contact center provides customer value through digital transformation

Artificial Intelligence (AI) has been a key tool within digital transformation ever since the advent of 'big data' sets, which are too large to be processed by traditional means. Some of the first applications of AI focused on disrupting standard business processes by assisting with data processing.

For contact centers specifically, AI can assist agents by predicting customer behaviors, providing best next action recommendations, continuously collecting data from customer conversations and automatically responding to customer complaints. Further still, AI can bring efficiencies to customer experiences through the application of natural language processing (NLP) to create chatbots and virtual assistants. Many of these skills leave contact center agents free to deal with more complex tasks that require human cognition or interaction.

"With AI we can reduce waiting times through the inclusion of bots, which optimally direct the client to the best department to solve their problem," remarks PagoFX's Barranco. "It also allows for an increase and facilitation of self-management by the client, thus making the procedures quicker and easier."

BGL Group is being assisted through the challenges created by Covid-19 with the help of 14 virtual assistants. These assistants handle the simple queries in real time allowing them to effectively reduce call volume and free up agents to handle more complex customer complaints. The efficient resolution of these simple queries can help give customers peace of mind and reassure them of the organization's capabilities.

These resource-saving benefits can be extremely useful for evidencing ROI to key business stakeholders which, according to research by CX Network, is currently one of the global top challenges complicating contact center and customer experience investments. Supporting this, our research group of contact center experts have identified finding budget as the top challenge behind integration into existing tools.

Top 10 CX investment obstacles according to our research group of contact center experts:*

Obstacle	Respondents (%)
Integration into existing tools	28%
Finding budget	28%
Integration into company culture and processes	22%
Demonstrating ROI	22%
Complicated internal sign-off process	17%
Board level buy-in	17%
Developing or locating right talent	11%
Getting regional sign-off	11%
Lack of time	11%
Lack of human resources	11%

0%   Respondents (%)   30%

respondents could select multiple answers

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Multi-experience customer innovation hubs

Initially, the role of a call center was reactive, but we are currently witnessing a shift toward a more proactive methodology through the advent of digital transformation.

Contact centers are shifting from being preoccupied with individual, event-driven interactions to becoming holistic, interactive experience hubs that focus on creating the best possible customer experiences. Initially, the primary focus of contact centers was cost reduction. Over the years we have seen the focus shift toward uplifting the most important business metrics, such as customer lifetime value and revenue.

It is also expected that the contact center of the future will be impacted by the increasing prevalence of 'autonomous customers'. These customers value ease of service over all else, including personalization, with one global study finding that the majority of customers will buy from organizations with a painless customer experience (82 per cent in the US and even higher in many other countries). In light of this trend, it is likely that organizations will look to self-service options to meet the demands of these autonomous customers.

What to avoid when implementing self-service features

The immediate benefits of self-service options are improvements in key business metrics such as reductions in costs and call volume. Coupled with their ability to allow customers to troubleshoot and solve their own problems out of office hours, without agent assistance, the implementation of self-service offers a valuable opportunity to improve the customer experience. However, self-service can be tricky to get right and there are a number of common pitfalls that should be avoided.

According to Marley Spoon's Fritz, one of the most common pitfalls with self-service is an overreliance on automation. 'Everything can be automated' was once a popular slogan in contact center customer experience.

However, more organizations are realizing that the personal touch and human to human interaction is absolutely necessary in some cases, particularly in light of the uncertainty customers endure in times of crisis.

"Sometimes people need to interact with humans," notes Fritz. "We need to understand which the individual, personalized needs are where we need to be in touch, avoid automation and ensure that the touchpoints that are important to customers for personal reasons, remain human."

Self-service models should be designed so they do not create new pain points for customers, as incomplete solutions that do not provide an option to connect with an agent if necessary can be a real headache for customers.

"To avoid frustrating a client, it is necessary to avoid showing unmanageable options without the possibility of solving them in their own way," explains PagoFX's Barranco. "So if any of the problems must be assisted by one of the agents, a clear and simple call to action, to quickly reach an agent, must be established."

Mobility, connectivity, empathy:
The new normal of customer contact

Empathy

One of the common complaints customers have is that they feel contact center agents are not sympathetic to their concerns. As such, an empathetic approach to customer interactions is essential for a contact center when attempting to provide the best experience possible for their customers.

Reby explains how the global tech giant Google has endeavored to remain empathetic in light of the Covid-19 crisis, and believes that it is critical for contact centers to understand where their customers are coming from. Google has moved quickly to adapt the Google Maps service to reflect critical updates in services and have invested in the development of platforms such as Google meets, to better facilitate remote working. Reby notes that "it is important to realize the customer's perspective and needs, and to adapt quickly to the new demands that are being made".

While the benefits of an empathetic response are more pronounced during times of crisis, the rewards are still significant in the day-to-day interactions that contact centers manage.
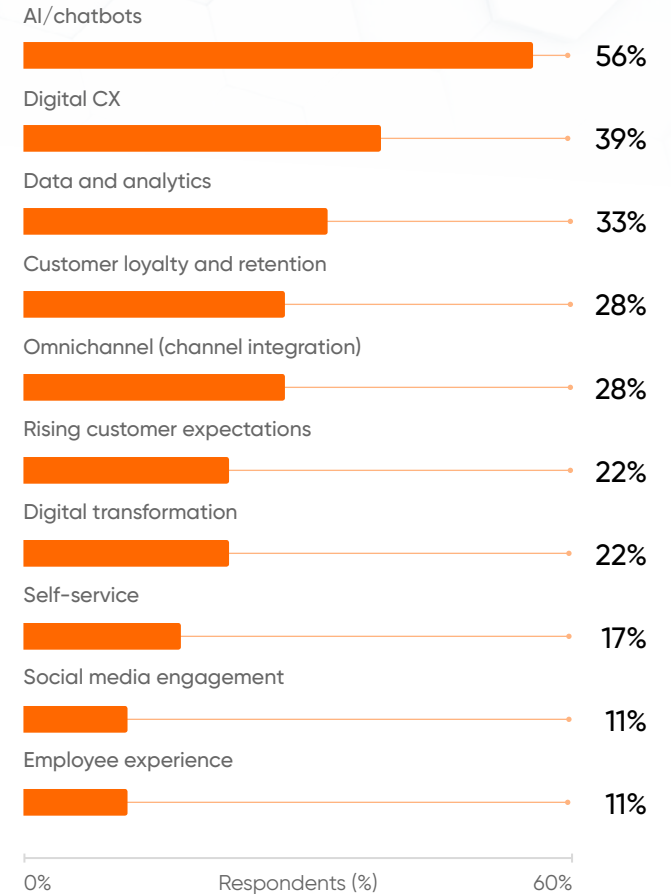
Nina Nair, senior VP and HRD head of India and Americas at 24.7 explains why empathy plays a vital part in resolving customer needs. It all stems back to understanding the intent driving a customer's enquiry. "Intent often involves two levels: the logical, stated level and the subconscious emotional level. Both these areas need to be addressed to deliver a complete customer experience.

"AI can be leveraged to classify whether the customer's intent is simple or complex. Simple intent is usually a logical, somewhat transactional, request with limited emotional depth. These can be easily handled in an automated fashion using AI.

"Enquiries with complex intents should be passed to a human agent so they can resolve the logical intent while catering to the underlying emotion as well. This synergy between AI and HI can take customer experience to a new level of excellence."

These advanced applications of AI have not gone unnoticed by industry professionals. More than half of our contact center research group listed AI as the top customer experience trend for 2020, indicating that the technology will only become more prevalent in contact centers in the future.

Top 10 CX trends according to our research group of contact center experts:*

AI/chatbots — 56%

Digital CX — 39%

Data and analytics — 33%

Customer loyalty and retention — 28%

Omnichannel (channel integration) — 28%

Rising customer expectations — 22%

Digital transformation — 22%

Self-service — 17%

Social media engagement — 11%

Employee experience — 11%

0%　　　　Respondents (%)　　　　60%

*respondents could select multiple answers

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Connectivity

Disjointed communication can cause frustration for customers. Too often customers are forced to repeat themselves when contacting an organization across multiple channels, due to a lack of connectivity between the channels. Most organizations already offer a multichannel solution, providing several channels for customers to communicate with. However, in order to achieve the level of connectivity between these channels that customers' desire, brands must look toward the integration of an omnichannel solution.

Omnichannel models have synergy between every customer channel, providing a holistic customer experience across all touch points. As new communication channels continue to emerge and evolve, omnichannel contact centers will need to remain agile and adapt to constantly changing customer preferences.

The research group of contact center professionals highlighted that there are clear trends in customer segments that prefer certain contact channels. This is evidence of the importance of omnichannel solutions as any approach that excludes certain channels will result in the exclusion of specific customer segments.

Marley Spoon's Fritz points to Disney for an example of 'best-in-class' omnichannel customer solutions.

She notes that through the successful integration of channels it has enabled its customers to manage a host of activities, such as planning trips or customizing gifts, in a pain-free way that provides a holistic experience across all channels. Due the evident advantages of an omnichannel solution, Fritz explains that this is something Marley Spoon consider a key objective for the future.

"We are aiming to fully leverage data and technology to provide our customers a fully personalized, end-to-end, omnichannel brand and product experience," she says.

Mobility

Since the advent of mobile internet, customers are now able to interact with and purchase products and services across all channels, on the go and at any time. This enflames customer expectations that organizations should always be available to address their concerns.

One way to combat this ambitious expectation is to ensure that your agents are as mobile as your customers, which means that, as more and more contact centers migrate to the cloud, the traditional idea of a contact center filled with agents taking calls from a desk may no longer be the norm.

"Various studies certify that a customer is willing to pay a higher price for good customer service, and that includes

its availability," remarks PagoFX's Barranco. "Offering various communication channels makes mobility much easier, ranging from phone to email, can make the customer feel served."

Voice of customer

In light of the recent crisis it is imperative that now more than ever brands ensure that they are plugged in to the voice of the customer. Customers are constantly communicating their perspectives, both overtly and covertly, with brands across a range of channels and, if correctly managed, these signals can help a brand optimize their customer experience.

"Voice of customer is not just for KPIs" notes Marley Spoon's Fritz. "It is important to understand the voice of the customer at each and every touchpoint, and implement a feedback loop in order to create exceptional services."

Contact centers are the ideal place for an organization to collect and react to voice of customer information. Post-call surveys can be used to generate customer satisfaction and Net Promoter Scores (NPS) and, as previously discussed, AI-enhanced tools such as voice analytics can portray customer sentiment and behavior scores to inform an organization on customer perspectives and needs.

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While a period of crisis can complicate integrating the voice of customer technology into your contact center approach, the increased and more severe nature of customer concerns can in fact present an opportunity to gain CX buy-in from key stakeholders for voice of customer initiatives.

"It is possible to skip past 'red tape' and get customer use cases front and center, since 'normal' is out the window," states Google's Reby. "From my perspective, the biggest opportunity in a crisis is to gather the customers' needs and present the use cases as a response to current events, such that changes are implemented quickly."

While the impact of voice of customer is much more pronounced during times of crisis, organizations who buy in to this methodology regardless of current events can ensure that their customer experience is truly addressing their customer concerns at all times.

The research group of contact center professionals indicate an understanding of the importance of the voice of customer, with 56 per cent indicating that customer feedback insights often reach the relevant business units and 72 per cent believing that customer feedback has been actioned.

How often does customer feedback reach the relevant business units?:

Mostly	56%
Sometimes	28%
Hardly	11%
Never	6%
Always	0%
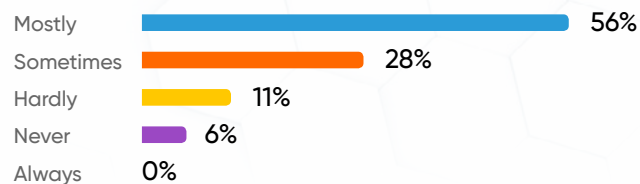
Has customer feedback has been actioned at your brand?:

Yes	72%
Don't know	17%
No	11%
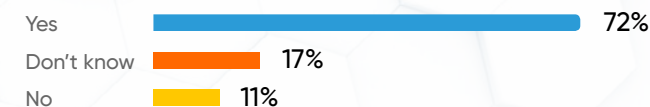
Actioned customer feedback

The research group noted that they have actioned feedback at their brands in a number of ways:

> "If a customer tells us there's a network problem, we proactively check their problem. If they left a bad comment, we try to explore what happened and call them back, using active listening to help them to solve the problem. Then we look to change business processes to prevent the issue from arising again."

> "Following up with every detractor and the majority of passive responses."

> "Escalating negative feedback for immediate rectification."

> "Upon receiving negative feedback, a session is organized to listen to the call and brainstorm. The decision to implement a change is made immediately and a resolution is given within turnaround time."

> "A cross-functional initiative was implemented to address customer concerns, aiming to simplify business processes and increase agility. This makes the company easier for the customers to do business with."

As long as organizations remain in touch with the voice of the customer they are always in a position to react to what their customers are telling them. This can go a long way to attaining customer loyalty, as they can see that you have listened to their concerns, and informing your brand of any necessary changes that need to be implemented in response to the current global health emergency.

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Final remarks

Contact centers have long been a key part of customer experience strategy, having evolved from the idea of a call center initially developed in the 1960s. However, this remains a developing field as industry trends and technological advances are constantly changing the way customers interact with organizations. As discussed in this report, we have seen contact centers evolve from simple call centers into omnichannel, multi-experience customer innovation hubs that focus on providing the best possible customer experiences across all channels.

This report has discussed 'the new normal' for contact centers in light of shifting customer trends, with specific focus on the global healthy epidemic, mobility, connectivity and empathy. Contact centers should apply some of the advice mentioned previously in order to remain relevant and competitive.

Contact centers should drive forward in how they capture and action the voice of the customer and strive to understand how it should be applied in a contact center environment. The voice of the customer, and the insights gained from it, should form the basis of innovation in your contact center, as it lets you know what your customers want and expect. Those who understand the demands of their customers can begin to understand what changes need to be made in order to address them.

As the demands and preferences of customers are constantly changing, brands will need to be equally flexible in the contact center solutions that they offer. Those that do will find themselves in a position to react quickly to rapidly shifting industry trends and stand to gain a competitive advantage for their brands as a result.

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johnkearns@IQPC.co.uk

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About CX Network

CX Network is an online resource for customer experience professionals providing value-rich content such as industry reports, customer trends, best practice, latest industry news, interviews with CX leaders and so much more! Our focus on the content that matters to customer experience leaders most, allows us to cut through the white noise that surrounds this ever-changing subject, and makes us the primary resource for CX executives to turn to.

By joining our network you will receive expert commentary, reports, and resources developed by and for experiences customer experience professionals and industry insiders. With a growing membership and global portfolio of events, CX Network ensures you keep your finger on the pulse by delivering practical and strategic advice to help you achieve your business goals.

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